

**Module D Section 2**  
**Financial Planning**  
**Quiz**

1. In an individualized funding system, how does money flow? What is its path?
  - A. The “funding source” allocates a certain dollar amount to the Support Broker who helps the employer design a budget. The Support Broker writes the checks to the providers if the employer cannot.
  - B. The “funding source” allocates a certain dollar amount to the individual, who with the help of a Support Broker establishes contracts with providers. Fiscal Employer Agents pay invoices from providers once the individual approves them.
  - C. The individual hires a Support Broker who determines how much money is available for supports. The Broker approves the budget before any services are coordinated.
  - D. The budget amount is set by the Fiscal Employer Agent who is in charge of all activities. The Support Broker and the Fiscal Employer Agent hire and fire employees.
  
2. Tim Stainton and Brian Salisbury tell us that Individualized Funding assumes a number of key points about people with disabilities and the funding of supports. Which answer is one of these key points?
  - A. Person-centered planning must be at the center of decision-making.
  - B. Individualized funding starts with the budget that is derived from assessment. The assessment of an individual’s abilities is essential to creating a large budget.
  - C. In an Individualized Funding system, the Circle of Support, and primarily the parents, are the key decision makers in terms of how money is spent.
  - D. Individualized funding assumes that whatever a person wants, they get. There should be no limit on funding. People with disabilities deserve to have the amount of money they desire to do exactly what they want to do.
  - E. None of the above.
  
3. What does *Employer of Record* mean?
  - A. The employer of record is responsible for advertising for employees.
  - B. The employer of record is responsible to pay the employee based on contract agreements.
  - C. The employer of record is responsible for all IRS regulations and workman’s compensation requirements.

- D. All of the above.
  - E. None of the above.
4. You read about Jay Turnbull, J.T., in this section. What are some challenges that J.T. experiences, and how did they affect his ability to be Self-Determined?
- A. J.T. is not able to count money and does not know how to follow a budget. This made it almost impossible for J.T. to receive access to an individualized funding program.
  - B. J.T. needed some help with his budget and getting everyday types of things done (i.e. shopping, coordination of provider schedules), so a housemate was found that could assist him with those things.
  - C. J.T. cannot talk very well and clearly needed speech therapy before he could direct his service providers.
  - D. J.T. is very proficient; he did not need supports to help him financially.
5. In your reading *Pointers for Families and Individuals Who Want to Manage Their Own Services*, John Agosta describes individualized budgeting. Which answer best identifies what the author considers important for effective and efficient budgeting?
- A. Creativity when developing resources.
  - B. Lobbying for more money to fund services.
  - C. Not to confuse control of resources with control over operational details.
  - D. A & B
  - E. A & C